



**THE ECONOMIC IMPACT OF RELIGIOUS TOURISM ON
DEVELOPMENT TOURISM INDUSTRY OF THE REPUBLIC OF
UZBEKISTAN: ANALYSIS, EVALUATION AND PROSPECTS**

Mirsaatov Jasur

Tashkent International Kimyo University, Tashkent, Republic of Uzbekistan

Abstract. The article examines the economic impact of religious tourism on the development of the tourism industry of the Republic of Uzbekistan. Based on statistical data from the State Tourism Committee and the World Tourism Organization, the dynamics of inbound tourist flow for 2015–2023 is analyzed, and the share of religious tourism in its structure is estimated. The multiplier analysis method is applied: the total economic contribution of religious tourism, taking into account direct, indirect, and induced effects, is estimated in the range from 945 million to 1.85 billion US dollars annually, which corresponds to 1.1–2.1% of the country's gross national product. Critical regional imbalances are identified: about 90% of tourist flows are concentrated in three regions, with significant untapped potential in the Fergana Valley and Surkhandarya region. A SWOT analysis is conducted, and strategic development vectors are identified. Specific recommendations for improving the effectiveness of public policy in this area are formulated.

Key words: religious tourism, pilgrimage, economic multiplier, tourism industry, Uzbekistan, SWOT analysis, regional development, public policy.

Introduction

The religious and pilgrimage sites of the Republic of Uzbekistan represent not only objects of spiritual culture but also a significant resource for the country's socioeconomic development. As the Tourism Development Strategy to 2030 is implemented, which envisions increasing the number of foreign tourists to 14.5 million and industry revenue to \$5 billion, studying the economic potential of religious tourism is of strategic importance.

Although the issue of religious tourism has been extensively covered in international literature [1; 2; 3], the economic dimension of this phenomenon in relation to Uzbekistan remains virtually unexplored. Most domestic publications focus on historical and cultural aspects, while issues of multiplier economic impact, regional disparities, and strategic management of tourist flows have not received adequate



analytical consideration. This article aims to fill this gap.

The aim of this study is to conduct a comprehensive assessment of the economic impact of religious tourism on the development of the tourism industry in the Republic of Uzbekistan and formulate substantiated recommendations for improving its effectiveness. The methodological basis is statistical analysis, Archer's multiplier method (1977), SWOT analysis, and a comparative method.

1. Dynamics of religious tourism in Uzbekistan: 2015–2023

The period 2015–2023 was characterized by fundamental changes in Uzbekistan's tourism industry. Reforms from 2016–2019—visa simplification, airport reconstruction, and large-scale investments in the restoration of monuments—led to a threefold increase in inbound tourist flow: from 2.0 million in 2015 to 6.7 million in 2019 [4]. The COVID-19 pandemic caused a sharp decline to 1.5 million in 2020, but the subsequent recovery surpassed pre-pandemic levels: a record 6.9 million foreign tourists were recorded in 2023.

According to expert estimates, religious tourism accounts for 15–20% of inbound tourism, corresponding to 1.0–1.4 million foreign pilgrims and religious tourists annually [4; 5]. The main markets of origin are Turkey, Kazakhstan, Kyrgyzstan, Indonesia, Malaysia, and the Middle East. The flow from Malaysia and Indonesia, where traditions of veneration of Sufi masters, including the founder of the Naqshbandi order, are deeply rooted in religious life, are growing particularly rapidly.

Table 1 — Dynamics of inbound tourism to Uzbekistan and assessment of the share of the religious segment (2015–2023)

Year	Total tourists (million)	Revenue (USD billion)	Share of retail tourism (%)
2015	2.0	0.8	12–14
2017	2.7	1.1	13–16
2019	6.7	2.5	15–18
2020	1.5	0.5	n/a
2021	1.7	0.6	10–12
2022	3.9	1.4	12–15
2023	6.9	2.9	15–20



Source: State Committee of the Republic of Uzbekistan for Tourism (2023); UNWTO International Tourism Highlights (2023); author's calculations and estimates.

2. Multiplier analysis of the economic contribution of religious tourism

To assess the overall economic impact of religious tourism, a multiplier analysis methodology was used, distinguishing three levels of economic effect [6]. The first-level direct effect reflects tourists' direct spending on tourism services. With a flow of 1.0–1.4 million religious tourists and an average trip price of \$450–600, direct spending is estimated at \$450–840 million annually.

The indirect effect of the second level is formed due to the purchase of goods and services by tourism enterprises from related suppliers: food producers, artisans, construction companies, and transport enterprises. Using the coefficient of 0.7, recommended by the World Bank methodology for the tourism industry of developing countries [7], the indirect effect is 315–588 million US dollars. The induced effect of the third level, associated with the expenditures of households of industry workers, is estimated at 180–420 million US dollars (coefficient of 0.4–0.5 of the direct effect). The total multiplier contribution of religious tourism to the country's economy, therefore, ranges from 945 million to 1,848 million US dollars annually, which corresponds to 1.1–2.1% of the gross national product of the Republic of Uzbekistan.

It should be noted that religious tourism differs from secular cultural and educational tourism in a number of economically significant characteristics. Firstly, it is more seasonally uniform: pilgrimages are not tied to the summer season, which reduces the seasonality of hotel occupancy and ensures a more uniform cash flow. Secondly, a greater share of expenditures "settles" in the local economy: pilgrims actively purchase religious paraphernalia, souvenirs from craft workshops, and use the services of religious sites—expenses that directly support local employment. Thirdly, a higher rate of repeat visits—approximately 30–40% of foreign pilgrims return within 3–5 years [5].

3. SWOT analysis and strategic positioning

To systematically assess Uzbekistan's competitive position in the field of religious tourism, a SWOT analysis was conducted, synthesizing the results of the previous study. Key strengths include: a unique concentration of Sunni Islamic "scholarly pilgrimage" sites, unmatched in any other country; the multi-confessional nature of the



heritage; the status of five UNESCO World Heritage Sites; an open visa regime for citizens of more than 90 countries; and price competitiveness (the cost of travel is 30–60% lower than in Turkey and the UAE) [8].

The most significant weaknesses include: uneven infrastructure development across regions; a shortage of guides speaking Arabic, Turkish, and Malay; insufficient digital infrastructure in the languages of key markets; and a lack of official statistics on religious tourism broken down by faith. Key opportunities include: the growth of the global Muslim middle class (according to Pew Research Center forecasts, Muslims will comprise approximately 30% of the world's population by 2050); the trend toward "authentic" tourism; the expansion of direct air links with Muslim metropolises; and the phenomenon of "second pilgrimage" after the Hajj and Umrah. The main threats include geopolitical instability, the risk of anthropogenic pressure on UNESCO sites, and increased competition from other Central Asian countries.

The analysis yields four strategic vectors. The SO strategy involves promoting the unique pilgrimage heritage in the growing markets of Malaysia, Indonesia, and Pakistan through specialized digital platforms. The WO strategy aims to overcome infrastructural limitations through digitalization—creating multilingual apps and online services. The ST strategy envisions the introduction of a capacity management system for UNESCO sites and market diversification. The WT strategy focuses on investing in staff training and standardizing the quality of pilgrim service.

4. Regional disparities and public policy

A critical problem in the development of religious tourism is the high geographic concentration of tourist flows. According to the State Committee on Tourism and Rural Development of the Republic of Uzbekistan, approximately 90% of foreign tourists are concentrated in the Samarkand and Bukhara regions and the city of Tashkent. The Khorezm region (Khiva) attracts approximately 7%, while other regions account for less than 3% [4]. Meanwhile, the Fergana Valley—the most densely populated region of the country with a population of approximately 7 million—possesses significant religious potential (Namangan, Andijan, Kokand), which is virtually untapped in tourism.

This disparity has significant socioeconomic consequences. The tourism clusters of Samarkand and Bukhara have achieved self-sustaining growth: the gross regional product of the Samarkand region roughly doubled from 2016 to 2023. At the same time, the phenomenon of "tourism dependence" makes these regions vulnerable to external shocks—the 2020 pandemic reduced their tourism revenues by 80–90%. Diversifying tourism flows across regions is both a matter of fair income distribution



and a factor in the sustainability of the national tourism industry as a whole.

State policy in this area is implemented through a set of tools: legal regulation (Strategy until 2030, presidential decrees on tourism 2016–2023); infrastructure investments (restoration of facilities, construction of hotels, development of the transport network); specialized pilgrimage routes (Ziyorat tourism); digitalization of the industry; international cooperation with UNESCO, ISESCO and key tourism markets [9; 10].

Conclusion

The study allows us to formulate the following conclusions. Religious tourism is a significant and economically significant segment of Uzbekistan's tourism industry: its total multiplier contribution is estimated at \$945 million–\$1,848 million annually, or 1.1–2.1% of GNP. Compared to secular cultural tourism, the religious segment exhibits a number of structural advantages: greater seasonal uniformity, a larger share of "localized" spending, and increased loyalty (repeat visits are approximately 30–40%). However, the realization of religious tourism's potential is constrained by a number of systemic constraints, primarily regional disparities and personnel shortages.

Based on the results obtained, the following recommendations are proposed. First, introduce official statistical recording of religious tourism by faith and country of origin. Second, create a multilingual digital platform in Arabic, Turkish, Malay, and Indonesian. Third, develop a specialized investment mechanism for the development of religious tourism in the Fergana Valley and Surkhandarya Region. Fourth, introduce a capacity management system for the most visited UNESCO sites to prevent anthropogenic damage. Fifth, certify guides specializing in religious tourism, requiring knowledge of Arabic or Turkish. Implementation of the proposed measures will increase the flow of religious tourists to 2.5–3.2 million people by 2030 and increase direct revenues in this segment to \$1.2–1.8 billion annually.

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